

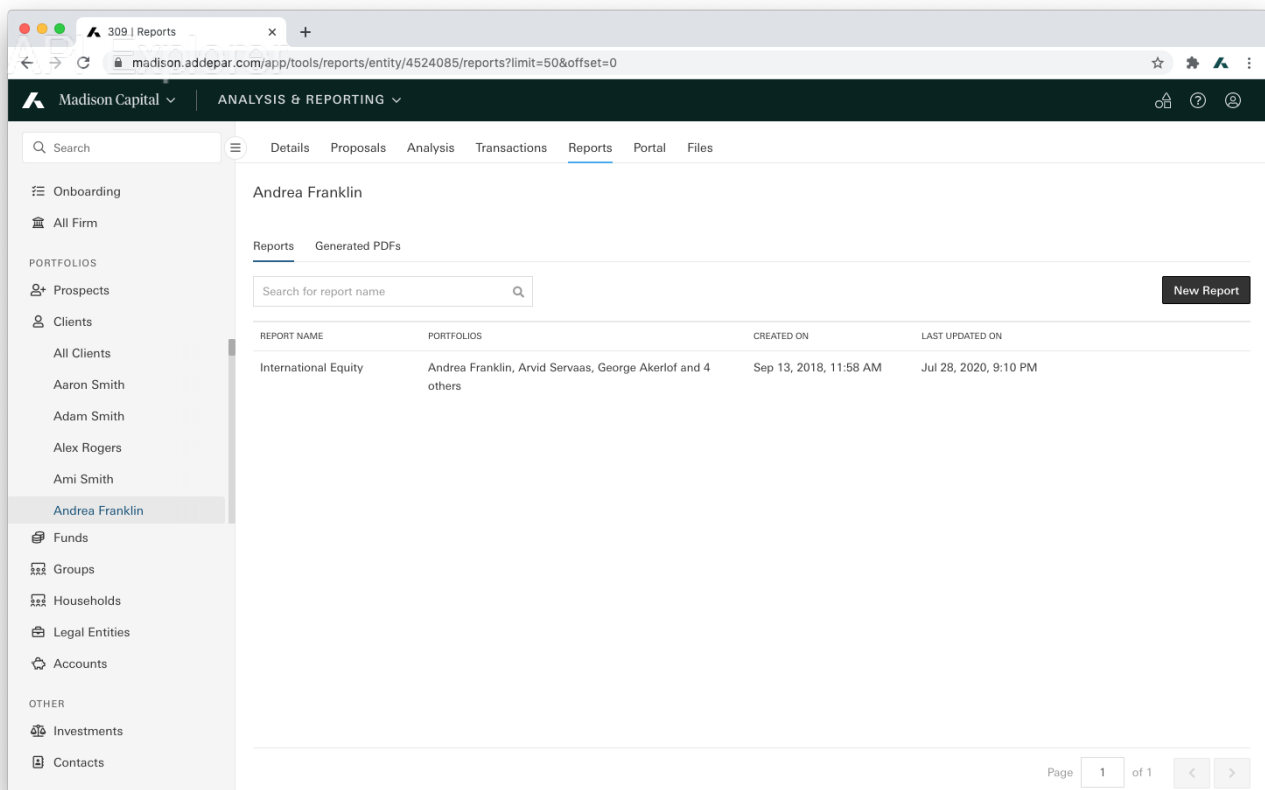


# Generated Reports

The Generated Reports API provides access to generated report objects representing the metadata associated with a single completed run of a report generation job.

A report generation job is initiated from the Addepar web application and generates report PDFs for the portfolios associated with a given report.

## Use Cases



Base route	/v1/generated_reports
Endpoints	<b>GET</b> /v1/generated_reports/:id /v1/generated_reports/:id/creator /v1/generated_reports/:id/zipped_file /v1/generated_reports/:id/zipped_file/download
Produces	JSON
Pagination	Yes
OAuth Scopes	<code>FILES</code> for all except /v1/generated_reports/:id/creator, which requires <code>FILES</code> and <code>USERS</code>
Application Permissions Required	"Access to all tools and portfolios."

## Resource Overview

All attributes will be returned in successful GET responses.

ATTRIBUTE	TYPE	EXAMPLE
report_id	The unique id of the report for which the report generation job was run.	46
report_name	The name of the report for which the report generation job was run.	"Quarterly Performance Report"
status	The status of the completed job. Either, <code>FINISHED</code> , <code>ERROR</code> , or <code>CANCELED</code> .  <code>ERROR</code> is due to system failure. <code>CANCELED</code> is an action taken by a user. Both these statuses might still result in one or more successful portfolios.	"ERROR"
started_at	String representing the time instant in UTC at which this report generation job was started.	"2021-02-14T10:15:30.00Z"
completed_at	String representing the time instant in UTC at which this report generation job finished.	"2021-02-14T14:25:45.00Z"
generated_portfolios	An array of objects providing information of successfully generated portfolios. Includes portfolio type, portfolio id, portfolio name, and file id.	"generated_portfolios"
portfolio_type	One of entity or group.	"entity"
portfolio_id	Unique id of the portfolio.	21
portfolio_name	Name of the portfolio.	"Tony Stark"
file_id	Unique id of the generated file. It can be used to download the actual binary file from <code>GET /v1/files/:id/download</code> .	101
failed_portfolios	An array of objects providing information of failed portfolios during report generation. Includes portfolio type, portfolio ID, and portfolio name.	"failed_portfolios"
portfolio_type	One of entity or group.	"entity"
RELATIONSHIPS		
creator	The user who created the report generation job that generated the associated files.	


## Optional Parameters

PARAMETER	DESCRIPTION	EXAMPLE
filter[completedAfter]=YYYY-MM-DDTHH:MM:SSZ	Returns jobs run after this date. The timestamp is in UTC.	[completed_after]=2021-05-14T12:03:39Z
filter[completedBefore]=YYYY-MM-DDTHH:MM:SSZ	Returns jobs run before this date. The timestamp is in UTC.	[completed_before]=2021-05-14T12:03:39Z
filter[status]=[FINISHED, ERROR, CANCELED]	Returns jobs by status. Filter by one or more of the following: <code>FINISHED</code> - done running <code>ERROR</code> - report ended in an error with one or more jobs failing <code>CANCELED</code> - A user stopped the job while it was in progress	[status]=FINISHED,ERROR


## Get all generated reports

Retrieves all generated reports that a user is authenticated to view, sorted in reverse chronological order of completion time.

**GET** /v1/generated\_reports/

REQUEST	RESPONSE
GET https://examplefirm.addepar.com/api/v1/generated_reports	

### Example with parameters

REQUEST	RESPONSE
GET /v1/generated_reports/?page[size]=50&page[number]=0&filter[status]=FINISHED,ERROR&filter[complete]	


### Responses

- 200 OK : Success
- 400 Bad Request : include query parameter not allowed
- 403 Forbidden : Lacking admin permission

## Get generated report by ID

Retrieves a generated report by id within the authenticated user's firm.

**GET** /v1/generated\_reports/:id

REQUEST	RESPONSE
GET https://examplefirm.addepar.com/v1/generated_reports/42	


### Responses

- 200 OK : Success
- 400 Bad Request : include query parameter not allowed
- 403 Forbidden : Lacking admin permission
- 404 Not Found : Nonexistent/non-permissioned generated report ID

## Get report creator by ID

Retrieves all information related to the user who generated the reports for the job id.

**GET** /v1/generated\_reports/:id/creator

REQUEST	RESPONSE
GET https://examplefirm.addepar.com/v1/generated_reports/42/creator	

### Responses

- 200 OK : Success
- 400 Bad Request : Invalid relationship queried

- 403 Forbidden : Lacking admin permission
- 404 Not Found

## Get reports in a zipped file by ID

Retrieves all information related to the zipped file generated for the job id.

**GET** /v1/generated\_reports/:id/zipped\_file

REQUEST	RESPONSE
GET https://examplefirm.addepar.com/v1/generated_reports/61/zipped_file	

### Responses

- 200 OK : Success
- 400 Bad Request : Invalid relationship queried
- 403 Forbidden : Lacking admin permission
- 404 Not Found

## Download reports in a zipped file by ID

Returns a binary zipped file.

**GET** /v1/generated\_reports/:id/zipped\_file/download

REQUEST	RESPONSE
GET https://examplefirm.addepar.com/v1/generated_reports/61/zipped_file	

### Responses

- 200 OK : Success
- 403 Forbidden : Lacking admin permission
- 404 Not Found

See more types of [file downloads](#)



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